suralink™

Client View Guide

SURALINK TUTORIAL

Suralink Tutorial
Client View

support@suralink.com

suralink.com
/company/**suralink**

WELCOME!

Welcome to the Suralink platform. This tutorial will help you become familiar with the platform's layout and functionality from the perspective of a Client User.

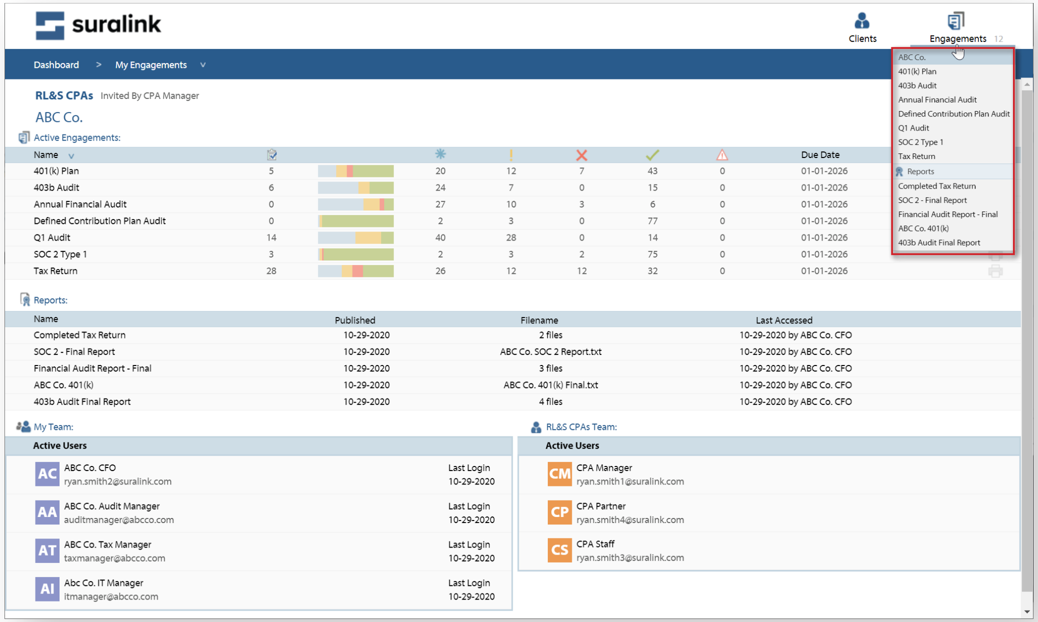
If you have any questions at all, please don't hesitate to reach out to us at **support@suralink.com**.

01.

LOGGING IN – CLIENTS PAGE

When you first log in, you will be brought to the Clients page. You will see a list of engagements for your company. You can launch an engagement by:

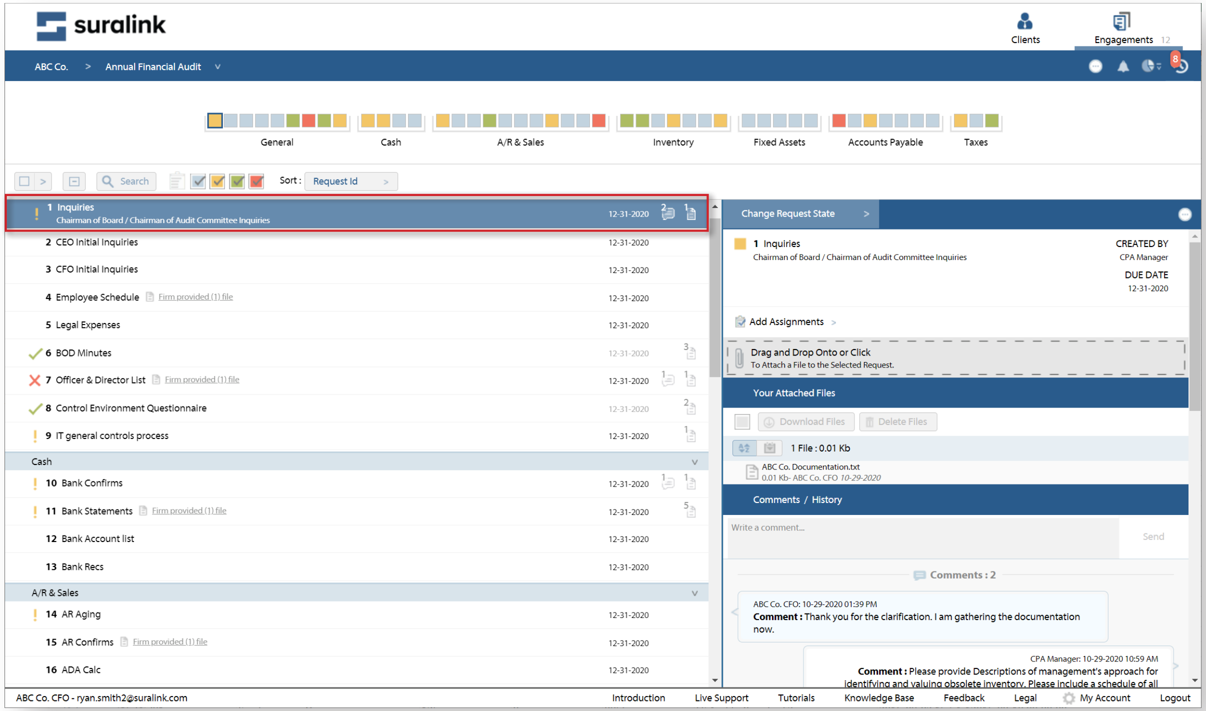
1. Clicking on an Engagement from the list or
2. Hovering your mouse over the “Engagements” button in the top right of the window, and clicking on the engagement you want to launch from the dropdown list.



02.

REQUEST LINE ITEMS

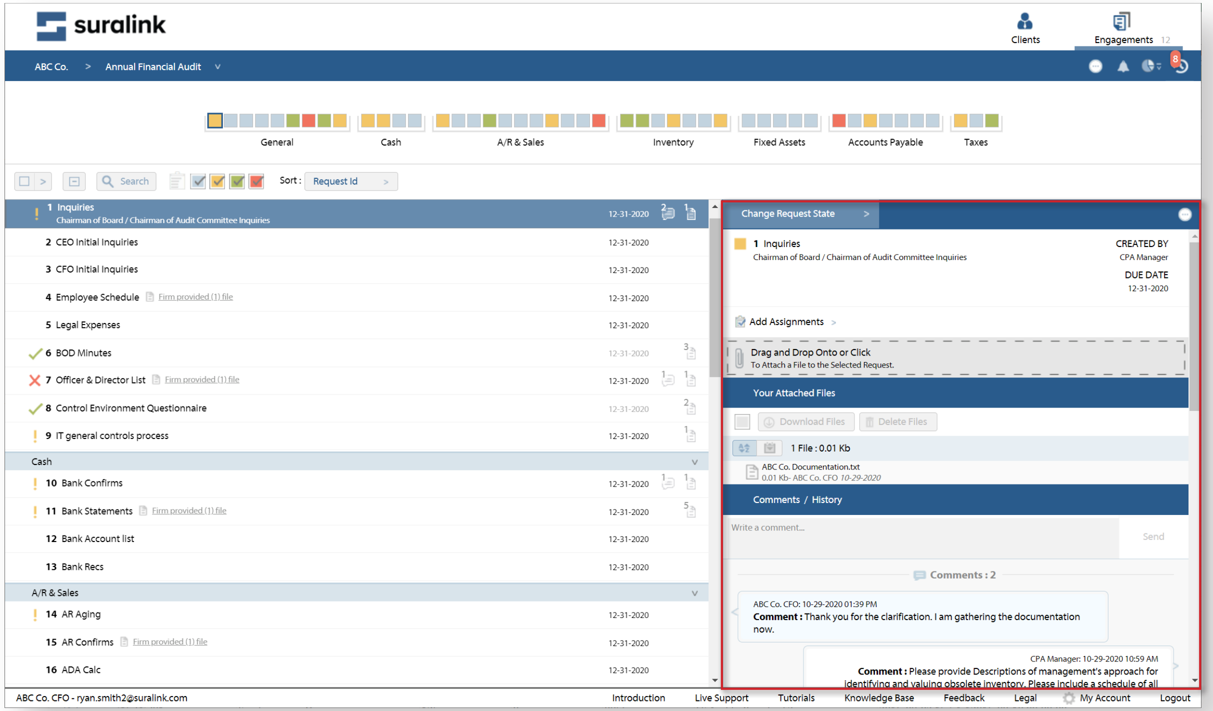
After launching an engagement you will be directed to the **Request List page**: *a dynamic request list integrated with a secure file portal.* On this page, you'll see a list of Request Line Items (also referred to as *"requests"*). These are a way to track the documents your accounting firm needs you to provide. You would normally see these items in a spreadsheet request list provided by your firm.



03.

REQUEST DETAIL PANE

When a request is selected, a detail of that request is displayed in the Detail Pane. This area shows the details of the request and provides another way to access files. It also includes a comments section where you can communicate with your accounting firm about individual requests as well as the history of that specific request.

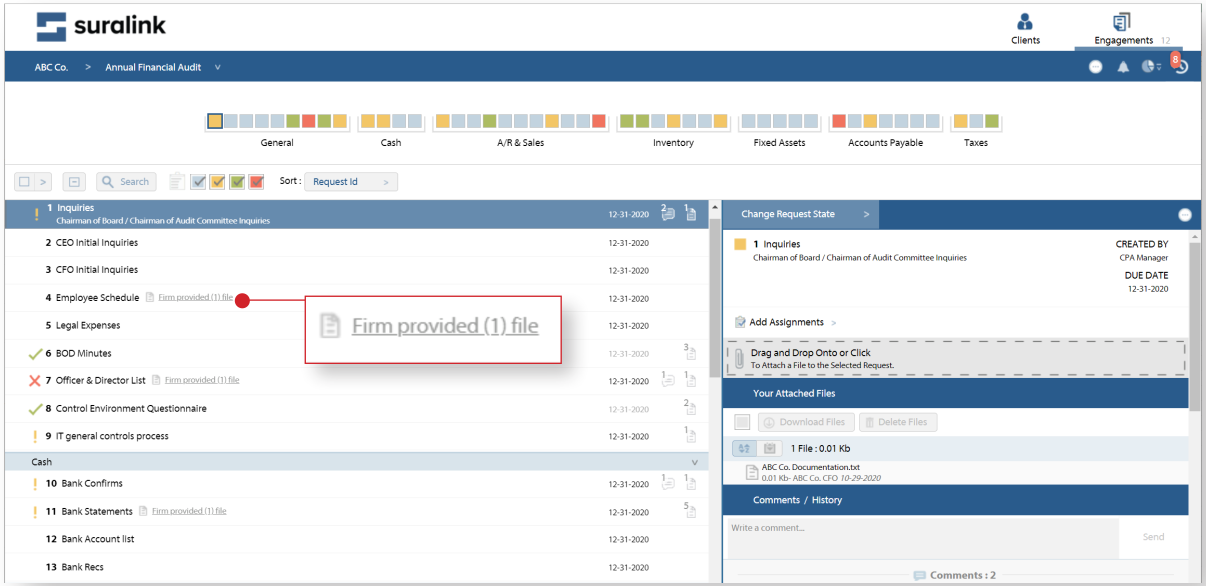


04.

FIRM FILES

Each request includes **Firm Files** and **Client Files**. Firm Files are documents your accounting firm provides to you. Documents provided by the firm may include: documents for your own records, a list of selections, or a template that you will need to complete and return.

If the firm has provided a file for a specific request, you will see a blue link on the request that says, "**Firm provided (x) files**." Clicking this link will allow you to download the files.



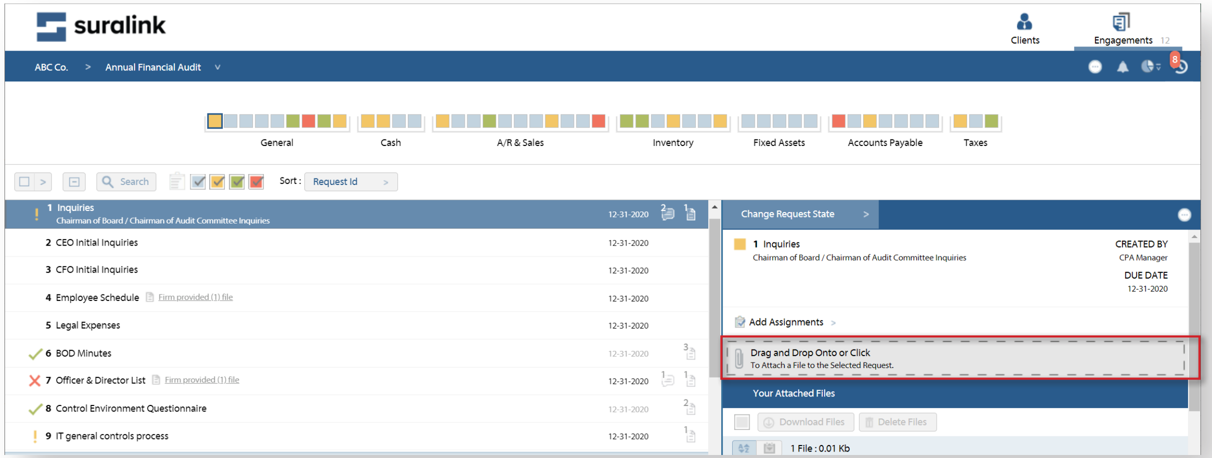
05.

CLIENT FILES

Client Files are the documents that you provide to your accounting firm. You can upload files to a request in two ways:

1. Drag and drop the files onto the request or into the Detail Pane.
2. Click the upload area on either the request or the Detail Pane to select files from your computer to upload.

Once uploaded, the documents stay attached to the request throughout the engagement. Your accounting firm can now easily access your documents for testing.



06.

REQUEST STATUS

The status of each request is indicated by a specific color and can be changed in the Detail Pane view. Additionally, once you upload a document to a request, the status of that request automatically changes from “Outstanding” **(gray)** to “Fulfilled” **(orange)**. After the firm evaluates the documents, they can change the request status to either “Accepted” **(green)** or “Rejected” **(red)** depending on if the documents you provided meet the firm’s requirements.

NOTE:

You, as a Client User, can only change the status of requests between “Outstanding” and “Fulfilled.”

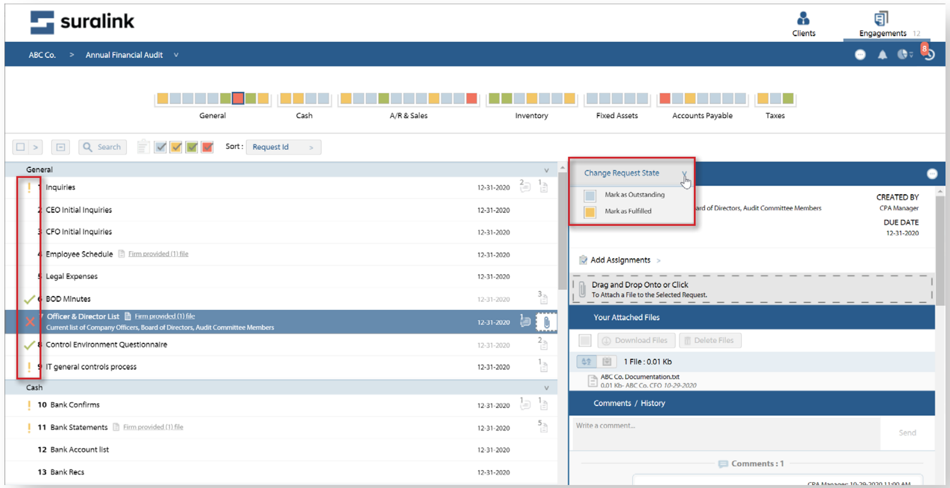
Users from your accounting firm can change requests to any status.

Outstanding: This is the default status; requests that are “Outstanding” (gray) require action from you.

Fulfilled: This is the status after you, the client, have provided the necessary documents.

Accepted: This is the status of a completed request that does not require any additional action.

Rejected: This is the status of a request that does not meet your accounting firm’s requirements and needs additional action from you. Your accounting firm should provide an explanation of why the request was rejected in the Detail Pane.

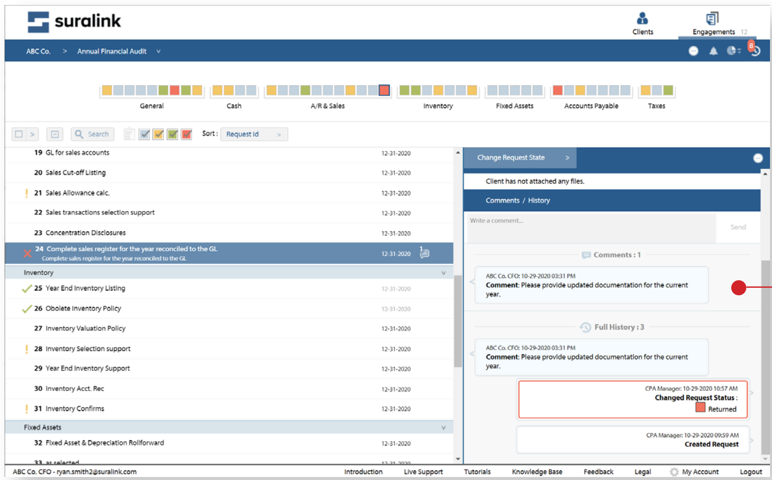


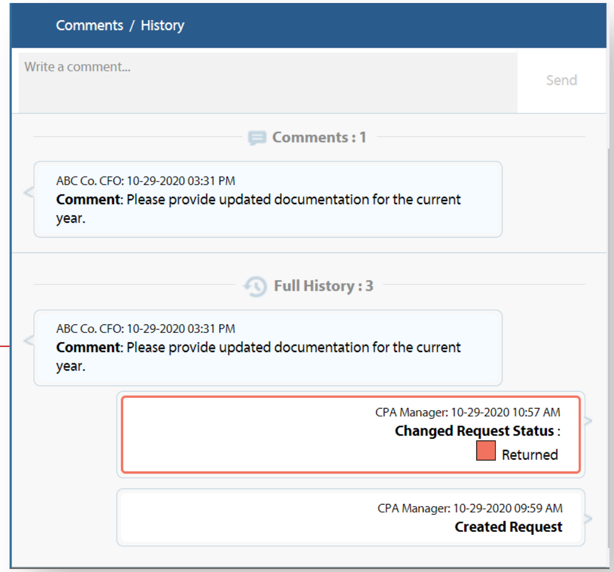
07.

COMMENTS AND HISTORY

Each request has a section that displays both the complete history of that request in addition to any comments associated with that request. Any action taken on a request—either by you or your accounting firm—is logged in the history. This includes everything from creating the request to uploading files and much more.

At any time, you or your accounting firm can add a comment to provide additional instructions or insight about a request. Examples of comments include asking for clarification about a request and communicating anything related to that request or its files. To leave a comment, simply type that comment in the box that says, "Write a comment."





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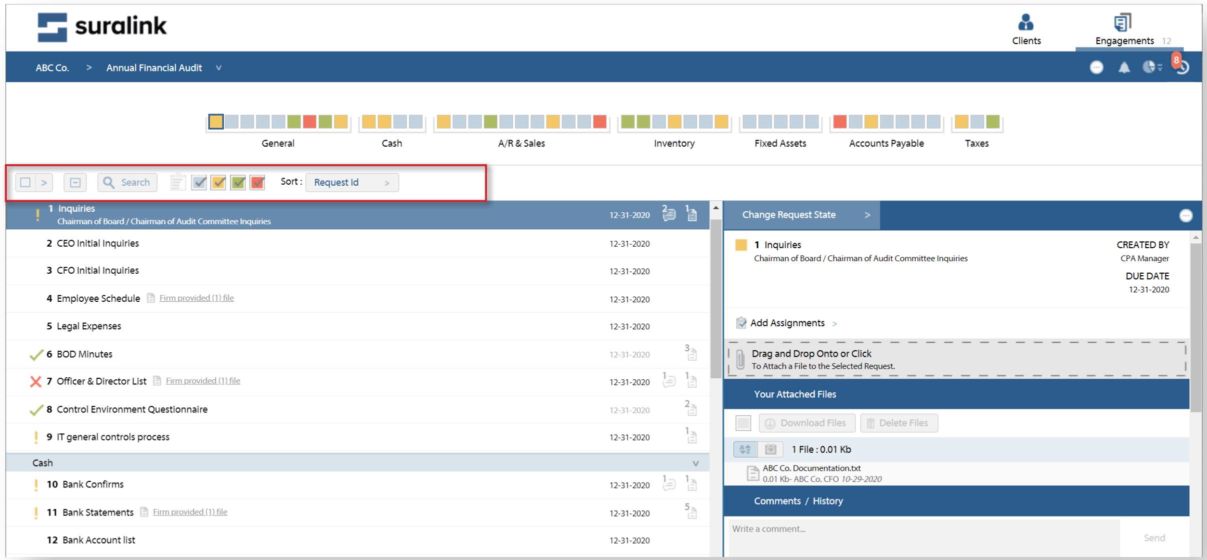
08.

SEARCHING AND SORTING

Located above the requests, the Search, Filter, and Sort features can be used to quickly find what you are looking for.

- The Search bar will search request names and descriptions.
- The Filter boxes (multi-colored boxes with checkmarks in them) will hide or show requests based on the selected Request Statuses (e.g., “Outstanding,” “Fulfilled,” “Accepted,” or “Rejected”).
- The Sort dropdown box sorts requests based on the criteria selected.

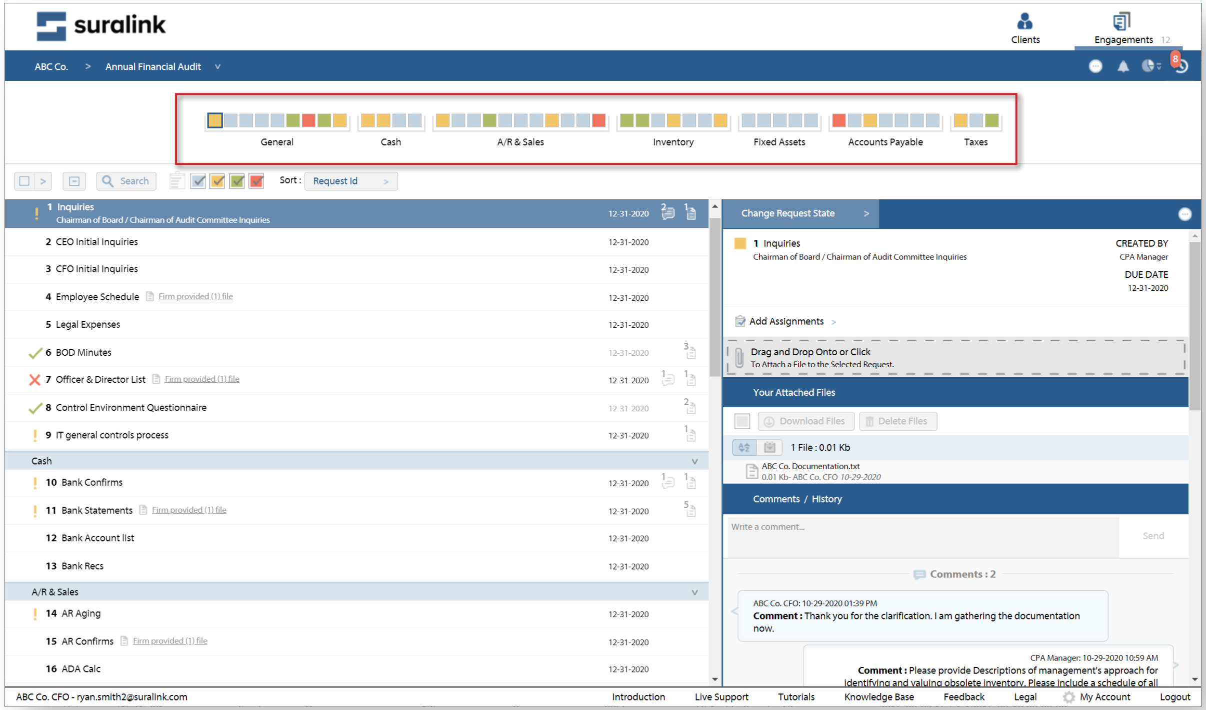


09.

QUICK VIEW BAR

Across the top of the page is the Quick View bar. This section displays the same requests you see in the Request Line Items section.

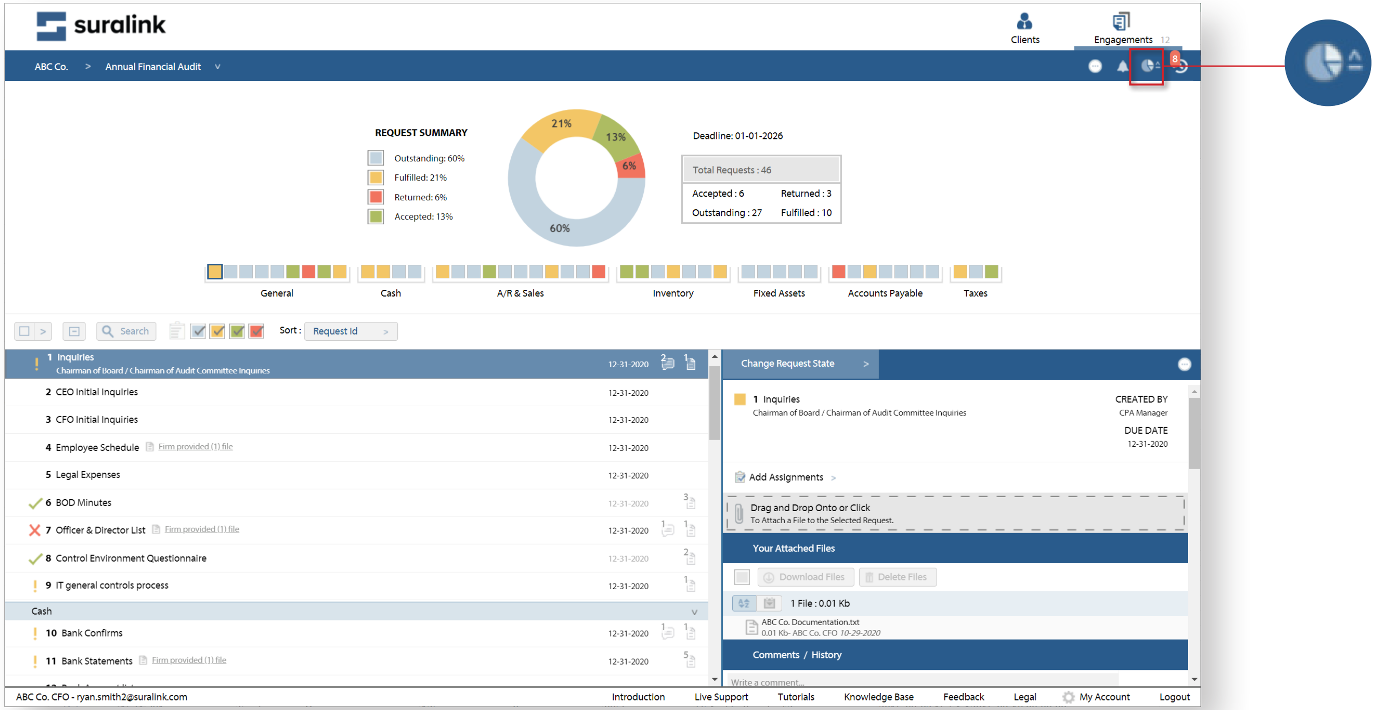
Each box represents a request and the color of the box represents that request's status. Mousing over a box displays the name of the request, and clicking the box selects the request in the Request Line Items section



10.

DASHBOARD

The Dashboard gives you a summary of your engagement, as well as notifications on past due requests or items that require follow-up. This section can be expanded or minimized with the Dashboard button.



Thanks for completing our tutorial! We wish you the best of luck as you begin using Suralink and are confident that it will help you increase efficiency and improve the client experience.

Contact us at **support@suralink.com** or through our live chat option in the platform if you have any questions.

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